

City of Helena's Records Management Overview

Records Management Committee Members:

Debbie Havens, City Clerk

Claudia Bagley, Municipal Court Administrator

Kim Sell, Paralegal

Robyn Brown, Deputy City Clerk

Ordinance 3077 and Records Management Program Policy

- Ordinance 3077 –Creating a Records and Information Management Program for the City of Helena, and establishing the duties and responsibilities of city personnel with respect to city records. Adopted March 2007.
- Records and Information Management Program Policy
- Electronic Records Management Policy was added as an attachment to the Records and Information Management Program Policy
- City of Helena Intranet - <https://intranet.helenamt.gov/>

What is a Record

- There are four categories for records –
 - **Historical** – The determination that records possess value in elucidating the history of the City and are thus worthy of permanent preservation as archival materials.
 - **Vital/Operational** – Any record of the City required to re-establish or continue the City in the event of a disaster; records containing unique and irreplaceable information.
 - **Fiscal** – The value attributed to a record series that documents financial transactions; the period of time a record must be retained for financial reasons or for tax/audit requirements
 - **Legal** – The usefulness of a record in complying with statutes and regulations, as evidence in legal proceedings, or as legal proof of business transactions

Montana Secretary of State

- Montana Local Government Records Management Guidelines - http://sos.mt.gov/Records/forms/local/Local_Records_Intro.pdf
- Every city department has an individual retention schedule. Each schedule is available on the Secretary of State's website and is listed under *Schedule No. 8 – Montana Municipal Records Schedules*. An example from the retention schedule of the City Clerk's office is listed below.

Schedule for: MUNICIPALITIES

CLERK'S OFFICE

COMMISSION/COUNCIL RECORDS

<u>Record Series Title and Description</u>	<u>Retention and Disposition</u>	<u>Citation/Comments</u>
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REPORTS AND STUDIES:

COMMISSIONED

Record copy of reports and studies
commissioned by the municipality and funded
with public monies, pertaining to
Public facilities, operations, and services.
Permanent (one copy).

REPORTS AND STUDIES:

MASTER/COMPREHENSIVE PLANS

Master plans and comprehensive plans
developed by departments.
Permanent

Public Records Request Form and Resolution outlining charges for copies of Public Records

- Request for Public Records www.helenamt.gov/commission
- Resolution 19214

QUESTIONS?